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Foreign
Agricultural
Service

Poultry:

World Markets and Trade

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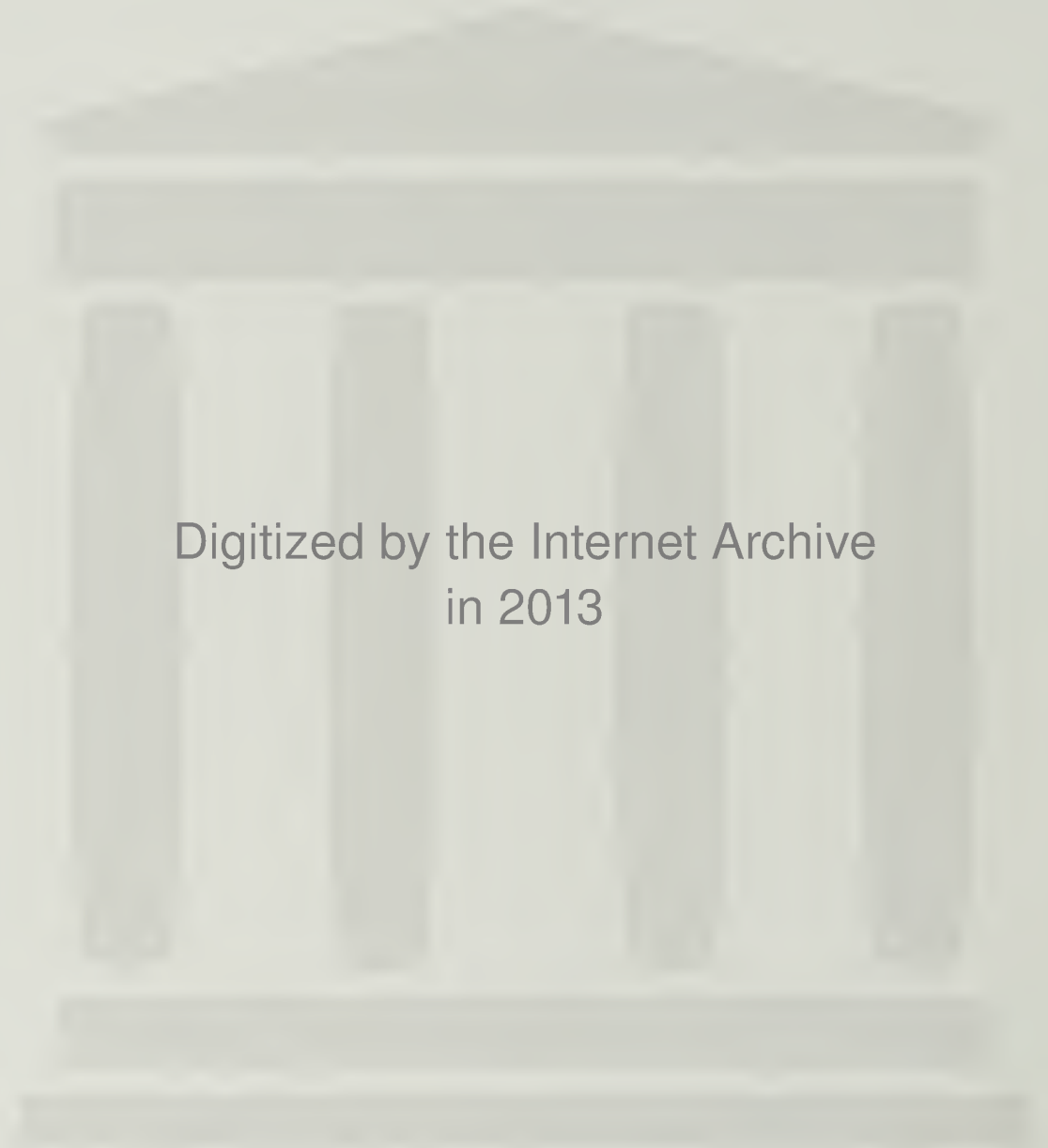
SUMMARY OF U.S. EXPORTS OF POULTRY PRODUCTS
in $1,000 of U.S. Dollars

	1/92–10/92	1/93–10/93	% Change
POULTRY MEAT			
Broiler parts	$500,776	$579,084	16%
Whole Broilers	$34,621	$26,848	–22%
Other Poultry Meat	$8,861	$7,049	–20%
Poultry Liver	$3,646	$7,400	103%
Turkey Parts	$83,294	$106,877	28%
Whole Turkeys	$7,723	$8,997	16%
Whole Fowl	$12,689	$20,105	58%
SUBTOTAL	**$651,610**	**$756,360**	**16%**
EGG AND EGG PRODUCTS			
Hatching Eggs	$39,944	$38,132	–5%
Table Eggs	$31,517	$38,018	21%
Dried Eggs	$14,421	$12,677	–12%
Preserved Eggs	$12,379	$12,581	2%
Egg Albumen	$14,131	$7,277	–49%
SUBTOTAL	**$112,392**	**$108,685**	**–3%**
OTHER POULTRY PRODUCTS			
Prep/Pres Poul Spec.	$89,552	$114,284	28%
Baby Chicks	$82,147	$87,649	7%
Turkey Poults	$4,555	$3,888	–15%
Other Live Poultry	$13,899	$9,903	–29%
Feather and Down	$20,415	$14,371	–30%
SUBTOTAL	**$210,568**	**$230,095**	**9%**
TOTAL VALUE	$974,570	$1,095,140	12%

Approved by the World Agricultural Board - USDA



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INTRODUCTION TO SEMI-ANNUAL UPDATE OF POULTRY PRODUCT PRODUCTION, DISTRIBUTION, AND TRADE

This publication presents revised data concerning the world's leading supply and utilization of poultry products, and discusses trends and key developments in selected countries. Data for the following 12 countries are updated in this semi-annual edition: Brazil, Canada, France, Hong Kong, Japan, Mexico, the Netherlands, Saudi Arabia, Singapore, Thailand, Russia, and the United States. The narrative and data presented here are intended to augment and compliment the information contained in the World Poultry Situation annual edition published in August 1993. The data for 1993 are still tentative as complete information for the entire calendar year was not yet available at the time of this publication. In most cases, the 1993 estimates are based on data covering the first 10 months of this year.

ANOTHER EXPORT RECORD EXPECTED FOR THE U.S. POULTRY INDUSTRY

The total value of U.S. poultry product exports is likely to set another record in 1993, forecast to increase by 10 percent to around $1.36 billion. A majority of the growth in U.S. poultry product exports was broiler and turkey parts. In the first 10 months of 1993, the quantity of U.S. broiler parts exports increased 32 percent over 1992, while the volume of U.S. turkey parts exports increased 38 percent. Shell eggs made large gains in 1993, showing a 34-percent increase in volume and nearly 20 percent in value.

In 1994, U.S. poultry exports are forecast to increase another 10 percent with an estimated value of $1.5 billion. The conclusion of GATT Uruguay Round

negotiation and passage of the North American Free Trade Agreement (NAFTA) in December 1993 along with the strong continual world demand for inexpensive chicken and turkey parts, are some major reasons for the forecast double-digit increase. The successful U.S. Export Enhancement Program (EEP) for table eggs has dominated the world egg trade in 1993 and is expected to do just as well in 1994.

Despite the export growth, trade barriers for U.S. poultry products continue to limit U.S. access for poultry and egg products. Many Latin American, Middle Eastern and Eastern European countries have restricted trade with the United States due to growing concerns about the competitiveness of their own domestic poultry and egg industries. Most of the countries seeking to block U.S. broiler parts imports often allege "dumping" to justify shutting off imports. No country has ever substantiated the claim that the United States is dumping. Since 1991 a number of these countries have erected a wide array of impediments to limit U.S. poultry imports. Using unreliable health and sanitary requirements for selected U.S. chicken products is only one of many technical barriers used to limit free trade. Another recent barrier now being used to hinder free trade is "shelf life" for table eggs. Many of the trade policy issues can be attributed to the collapse of the poultry and egg markets in the former Soviet Union (FSU). With the collapse of the FSU market in 1991, U.S. exporters began to look for other market outlets.

WORLD BROILER SITUATION

U.S. BROILER EXPORTS MAKE LARGE GAINS IN THE FIRST TEN MONTHS OF 1993

Attractive U.S. prices drove the growth in U.S. broiler part exports in 1993. Exports are of increasing importance to the U.S. broiler industry, accounting for 8 percent of production in 1992 compared with 4.7 percent in 1989. The export market has been especially strong for dark meat leg quarters, as the U.S. domestic market continues to favor white breast meat. In

the first ten months of 1993, the top 5 markets for U.S. broiler cuts were Hong Kong (171,608 metric tons), Japan (89,373 tons), Mexico (62,544 tons), Russia (54,199 tons), and Poland (45,015 tons). Growing demand in Hong Kong, combined with the thriving re-export of broiler cuts to southern China, propelled Hong Kong into the top position among overseas U.S. broiler markets. Broiler parts exports to Japan, previously the number one market for U.S. broiler parts, declined somewhat due to sluggish demand and high stocks in Japan. U.S. exports of broiler parts to Mexico were driven by the overall growth and increased specialization of Mexico's retail food sector. The competitive prices of U.S. broiler parts also resulted in growth in sales to a number of other markets including, Russia, Romania, Guatemala, South Africa, Iran, Colombia, and Venezuela.

U.S. broiler exports in 1993 likely increased about 28 percent over 1992, to 866,000 tons valued at about $775 million, the most rapid increase since 1990's 40-percent increase. Growth is spread over almost every major market with Hong Kong, Mexico, Japan, Russia, Poland, Jamaica, and Canada being the top markets for U.S. broiler parts. Parts comprise about 96 percent of total broiler exports as the exports of whole birds continue to decline.

U.S. broiler exports in 1994 are expected to increase to around 907,000 tons, propelled by continued production increases and competitive prices of U.S. chicken leg parts. Increases are expected to most markets including Japan, which will continue as the world's largest broiler import market. Sales to the former Soviet Union (FSU) remain more uncertain due to financing problems. However, strong broiler leg parts sales to the Russian Federation (Russia) in the first ten months of 1993, totaling 54,200 tons, indicate a possible rebirth in U.S. exports to the FSU. This increase in broiler sales to Russia was largely primed by U.S. Department of Agriculture's food donations to the Russian Government totaling, 10,547 tons valued at $7.9 million.

BRAZIL CONTINUES TO EXPAND BROILER PRODUCTION DESPITE LITTLE GROWTH IN EXPORTS

Brazil's broiler meat output in 1993 increased about as much as it did in 1992 and reached 3.1 million metric tons, another record. In August 1993, placements totaled 185 million units, the largest increases since 1987. January-August 1993 placements totaled 1,375 million chicks, up 6.6 percent from the same period in 1992. Broiler meat production during January-October 1993 totaled 2.6 million tons, or 9.2 percent above the same period in 1992.

The outlook for 1994 remains optimistic and Brazilian trade experts forecast an increase in broiler production of 9 percent to 3,410 thousand tons. Favorable net returns in 1993 are expected to encourage this expansion in production. Poultry producers also believe that feed costs will be under control in 1994, and domestic demand may continue firm if current wage policy adjustments are maintained throughout next year. Most of the expanded production is expected to be consumed in the domestic market.

In 1992, major markets for Brazilian poultry were Saudi Arabia (122,000 tons), Other Middle Eastern Countries (51,000 tons), Japan (65,100 tons), the European Union (EU) (44,700 tons), and Argentina (39,000 tons). During the first 9 months of 1993, broiler exports totaled 272,975 metric tons, about the same as 1992.

Whole broilers accounted for 176,079 tons of the 1993 total, an increase of 5 percent, and parts dropped by 8 percent to 96,896 tons. However, total export value declined by 7 percent during January-September 1993 compared to the same period in 1992. Value of whole broiler exports were up by nearly 6 percent, while parts declined by 20 percent, mostly due to the rise in EU tariffs on Brazilian broiler parts.

CANADIAN POULTRY PRODUCTION ALLOCATIONS TO INCREASE IN 1994 IN ANTICIPATION OF INCREASES IN BROILER DEMAND

Since January 1979, the government of Canada (GOC) has imposed global restrictions on access to Canada's chicken consumer markets. The GOC continues to maintain a strict supply management policy for most of their domestic poultry producers and continues to restrict imports of poultry products. Allocations for production increases are assigned each year tied to increases in domestic demand.

With the implementation of the U.S./Canada Free Trade Agreement on January 1, 1989, an import quota was established calculated at 7.5 percent of Canada's previous year's production of chicken. Canada's national marketing agencies, which monitor the demand for poultry products, are expected to increase their 1994 domestic production allocations above 1993 levels in response to an anticipated modest increase in poultry demand.

In 1992, the United States exported 33,772 tons of chicken parts to Canada. In the first 10 months of 1993, the United States supplied Canada with 28,494 tons of parts, down 1 percent from the same period in 1992.

FRENCH BROILER PRODUCTION REDUCED 2 PERCENT FOR 1993 WITH NO GROWTH EXPECTED FOR 1994

French poultry production has suffered greatly in 1993, and French producers are not looking forward to 1994 with great anticipation. Continuing strong competition for third country poultry markets from major suppliers like the United States and Brazil, along with the 20-percent reduction in EU poultry subsidizes, have hindered France's broiler production. Currently, 1993 French broiler production is estimated at 1.039 million tons a 2-percent increase over 1992, but with continued economic stress, a decrease of 5-6 percent is anticipated for 1994.

In 1992, 60 percent of French exports of chicken parts (including preparations) went to other EU Member States. While the majority of France's poultry exports to third countries are whole chickens, non-EU, markets in 1992 for poultry parts (including preparations) were Saudi Arabia (119,300 tons), Other Middle Eastern Countries (88,300 tons), and Africa (27,300 tons).

France currently prohibits the importation of U.S. poultry meat for human consumption because France claims that U.S. poultry feed can contain arsenical compounds, which are forbidden under French law. However, the United States regularly supplies the French market with chicken offals, which are authorized for use in the manufacture of pet food, and frozen livers, which are used for preparing certain foods.

JAPAN BROILER CONSUMPTION DWINDLES IN 1993

The Japanese broiler industry continues to be faced with many internal economic challenges. Soaring poultry stocks, surging imports, the lingering Japanese economic recession, and attractively priced beef all affect the domestic broiler industry. Japanese broiler consumption started dwindling in 1993 as retailers throughout the country increased beef sale campaigns under the banner name of "tariff reduction" and "high yen" merits. As a result, domestic wholesale prices continued to fall for both de-boned leg and breast meat.

In the first 10 months of 1993, average prices fell below the 500 yen/kg mark for de-boned legs and below the 300 yen/kg mark for breast meat. Some domestic processors are reported to be giving to large volume buyers substantial discounts that fall below production costs and below import prices in an attempt to keep production lines operative.

In 1992, Japan's broiler imports by source were Thailand (145,500 tons), the United States (118,400 tons), Brazil (65,100 tons), China (58,900 tons) and the EU (3,700 tons).

Broiler imports in 1993 were expected to decline by 9 percent from 1992 levels, with China making a substantial increase over other suppliers. Broiler imports from China were up 40 percent during the first ten months of 1993 whereas Thailand and Brazil were both losing market share, down 16 percent and 17 percent respectively. Low labor costs in China, improved processing, and price competitiveness all worked as advantages for China's expansion.

The United States sustained a 5-percent increase owing to increased bone-in leg imports, which more than off-set the decline of other parts. Year end total imports are likely to reach 350,000-360,000 tons as fourth quarter imports will likely to decrease. The outlook for broiler imports in 1994 will no doubt be affected by the movements of domestic stocks, and are not expected to reach 1993 levels.

MEXICAN BROILER PRODUCTION EXPECTED TO GROW 5 PERCENT IN 1994.

Broiler meat production for 1993 is estimated at 1.03 million tons with a 5-percent growth expected for 1994. As a result of reduced returns, large poultry firms have suspended expansion programs and new investments. According to specialists, the years of high positive net returns for the Mexican poultry sector are over. With the NAFTA in mind, the industry is expected to concentrate its efforts on efficiency gains and further integration to effectively compete against increasing imports of lower priced U.S. dark meat.

Poultry producers expect to reduce feed costs upon implementation of NAFTA. Under the first year of this agreement, the 15 percent import tariff for sorghum will be eliminated and duty-free access to the Mexican market will be assured for 2.5 million tons of corn. To date, the government of Mexico (GOM) has not indicated how the import quota for corn will be distributed among different industries, including the livestock sector.

Less than 5 percent of total chicken meat produced in Mexico is state inspected. Most of the output is whole chicken of the New York type which is distributed in wet markets, mostly in central and southern Mexico. Inefficient processing and marketing systems, as well as animal health and food safety problems, are still major obstacles to overcome.

In the first 10 months of 1993, Mexico imported 53,700 tons of U.S. chicken parts, increasing 16 percent from the same period last year. Whole broiler imports decreased 13 percent to 6,509 tons. Still, Mexico remained the United States largest single market for whole bird exports in 1993.

LARGE INCREASES IN NON-EU TRADE EXPECTED TO SPUR DUTCH POULTRY PRODUCTION IN 1994

Dutch poultry meat production in 1993 estimated to be down 2 percent from 1992, is mainly caused by an estimated 1 percent reduction in broiler meat production. Production of other chicken meat in 1993 is estimated at nearly to 1.9 percent higher than in 1992, while production of other poultry meat (mainly ducks and guinea fowls) is estimated to be down about 11.5 percent compared to 1992. Continued heavy competition with other EU producers and lower export demand from non-EU countries are the two main reasons for the drop in overall 1993 production of poultry meat.

During the first 10 months of 1993, the trend in broiler contract prices and producer prices was fairly stable at 5.5-6.0 percent lower level than in 1992. This was mainly caused by increased competition from larger broiler meat supplies from

France and the former East Germany on the (West) German market, while the growth in consumer demand stagnated. During the same time, Dutch broiler feeding costs have averaged about 3.1 percent less than in the same period of 1992. Dutch producers will probably increase broiler production 3.8 percent in 1994 taking advantage of lower feed cost and expanding non-EU trade.

Dutch third country poultry trade (non-EU countries) increased by 28 percent in volume for the first 10 months of 1993. By far the most significant volume increase was recorded in exports of other chicken meats rather than in broiler meat. The biggest gains were recorded in exports to Russia (mainly chicken legs), Poland, China, Cuba, the U.A.E., Iraq, Saudi Arabia, and other Middle Eastern countries, while exports to African countries and other Asian destinations suffered some set backs.

As the market for frozen whole chicken and chicken parts becomes even more competitive due to an oversupply situation, several importers are now concentrating on market niches for deboned chicken parts and portion controlled breaded or marinated chicken. Since labor costs are becoming higher and higher, any chicken or meat products which do not need much preparation are of interest to the food service industry.

AFTER STEADY GROWTH FOR SEVERAL YEARS, THAILAND'S BROILER INDUSTRY FACES DIFFICULTIES

Thai broiler production is estimated to drop moderately in 1993, due to chick production control initiated by poultry producers. The chick producers have concordantly scaled down their chick output this year in an effort to stabilize and strengthen chick prices and export prices for frozen broilers. Under the cooperation scheme, chick producers culled female breeding chickens at a younger age and destroyed fertilized eggs before hatching. Broiler production is forecast to recover somewhat in 1994 in anticipation of this cooperation program.

According to trade sources, all feedmills have recently increased the prices for commercial chicken feed by 2-3 percent in response to the higher costs of some feed ingredients (especially soymeal and fishmeal). The current surcharges are $37 per ton for soymeal and $88 per ton for fishmeal. In July 1993, the Thai Government placed a $15 per ton surcharge on imported corn. It had been zero in the 1980's. This move was designed to prevent the decline of domestic corn prices for the 1993/94 harvest.

Realizing that higher production costs, in terms of feed cost, are posing a threat to Thai competitiveness in exporting frozen chicken, both exporters and broiler producers have voiced their concern to the Government of Thailand (GOT). In their petitions, they requested that the GOT to use the surcharge levied on imported feed ingredients to subsidize farmers and exporters. The Food Policy Committee, a government arm, recently agreed to use the surcharge fund to provide a rebate to the chicken exporters, if the exporters incur losses from their sales. The rebate for all exported poultry meat, to compensate for the import tariff on feed ingredients, is 0.37 percent based on export value.

The largest export markets for Thai broilers in 1992 were Japan (145,500 tons), Hong Kong (5,100 tons), Singapore (4,100 tons), and the EU (14,800 tons). The GOT recently reported that Thai exports of frozen broilers during the first 9 months of 1993 totaled 111,773 tons, as opposed to 132,681 tons in the same period of 1992. The sharp decline in exports is attributed to a slowdown in Japan's economy and increased competition from other exporting countries, especially China and Brazil. Based on these figures, the estimate of Thai broiler exports in 1993 has been revised down to 140,000 tons, 20 percent lower than the previous year's level. Industry estimates indicate that

about 98 percent of the exports in 1993 were deboned parts (ordinary deboned chicken: 30 percent, fancy cuts: 68 percent), with the balance being bone-in-leg products and whole chickens.

Thai broiler exports are forecast to remain unchanged in 1994 as a slight increase in exports to Japan may only offset a possible decline in sales to the EU. Exports to Japan may improve slightly in 1994 in anticipation of a recovery in Japan's economy and decreased domestic broiler production in Japan itself. However, protectionist practices may cause export sales to the EU markets to drop marginally in 1994. The EU usually applies the variable levy to Thai chicken at a level which protects its domestic processors.

Export prices to Japan had firmed at $2,400-2,500/ton for ordinary deboned broilers during mid 1993 in response to a sharp decline in Thai broiler supplies. However, export prices have recently weakened again due to inactive purchases from Japanese importers and a devaluation of Chinese currency which made Thai broilers less competitive. The export prices to Japan are currently at $2,050-2,150/ton for ordinary boneless meat and about $3,100-3,200/ton for Yakitori fancy cuts.

WORLD TURKEY SITUATION

NAFTA MAY SLOW DOWN U.S. TURKEY PARTS EXPORTS TO MEXICO

Due to a growing tendency to use turkey meat as an important ingredient in further processed red meat products, U.S. exports of turkey meat grew substantially in 1992. Mexico was the dominant market for U.S. turkey meat in 1992, accounting for about 60 percent of total exports. Mexican meat processors are finding U.S. turkey meat a cost-effective alternative to using red meat in a number of processed meat items. Similarly, U.S. turkey meat exports to South Korea grew as a result of the increased use of turkey meat in South Korean specialty meat items. In 1992, U.S. turkey exports to South Korea nearly doubled and comprised about 10 percent of total U.S. turkey meat exports.

In 1993, U.S. turkey exports likely increased over percent to about 104,000 tons valued at about $145 million. Exports were equivalent to 4.8 percent of U.S. production. This proportion has risen steadily in recent years as world demand for relatively low-priced turkey meat parts has increased.

U.S. turkey exports in 1994 are expected to fall to 88,000 tons. Although U.S. turkey prices are expected to remain competitive in world markets, the implementation of NAFTA's Tariff-Rate Quotas (TRQ) schedule may reduce Mexican turkey part imports from 64,000 tons in 1993 to 50,000 tons in 1994 a 22 percent decrease. In 1994, the TRQ's for U.S. turkey parts is set at 28,000 tons, although this amount can be liberalized at the discretion of the Government of Mexico. Exports are expected to continue increasing to South Korea and Hong Kong due to freer markets.

FRENCH TURKEY PRODUCTION STAGNANT IN 1993

The steady expansion over the last several years in French production and exports of turkey meat is beginning to show signs of stagnation. Whereas growth rates in French turkey production ranged between 10 to 16 percent from 1989 to 1992.

Within the EU, the United Kingdom (UK) is the number one destination for French exports of whole turkeys. During the first 6 months of 1993, French whole turkey exports to the UK increased 82 percent compared to the same period in 1992. Spain also showed a major increase in whole turkey imports from France from 1992 to 1993, largely reflecting the efforts of the Bourgoin Society Anonyme (BSA Group), the second largest French poultry producer and the EU's top turkey exporter.

The biggest customer for French exports of turkey parts is Germany, which increased its imports by 7.2 percent during the first 6 months of 1993, compared to the same period in 1992. One reason for the increased imports is that French offer prices at the beginning of 1993 were lower than at the beginning of 1992. The devaluation of the franc last August has made French supplies even more competitive vis-a-vis German supplies, which should ensure, for at least the short term, continuing strong French exports of turkey parts to Germany.

U.S. TURKEY EXPORTS TO MEXICO UNCERTAIN IN 1994

As anticipated by Mexican producers, 1994 turkey meat production is forecast to further decline due to the inability of the Mexican turkey industry to compete with imported product from the United States. Domestic producers are gradually leaving the industry rather than diversifying operations.

In 1993, turkey part imports from the United States increased at double-digit rates. In the first 10 months of 1993, U.S. exports of turkey parts totaled 52,988 tons, a 65-percent increase over the same period a year ago. The majority of U.S. turkey part exports into Mexico are used as an alternative to pork. U.S. whole bird exports for 1993 fell estimated 31 percent from 1992 mainly due to limited demand for large turkeys during the holiday seasons.

In 1994, turkey parts imports may fall by 22 percent due to the NAFTA's TRQ schedule. TRQ for U.S. turkey parts is set at 28,000 tons, while the U.S. whole turkey TRQ is set at 2,000 tons. U.S. turkey parts exports to Mexico are expected to reach this TRQ within the first 8 months of 1994. Currently, procedures are being developed to monitor the border movement of U.S. turkey parts into Mexico. If as is anticipated the Government of Mexico (GOM) does not assess the 260 percent over-quota tariff U.S. turkey part exports could significantly exceed the quota amount established for 1994.

Mexican turkey consumption is projected to increase for 1994 because of price competitiveness and the quality of imported products. In 1993, per capita consumption is estimated at .74 kilograms per person. Large sausage companies continue to increase utilization of imported mechanically deboned turkey meat from the United States to produce sausage under domestic brands. As with uncooked chicken meat, illegal importation of uncooked turkey meat was not completely controlled. Prior to the NAFTA, uncooked turkey meat imports were subject to import licenses while processed meats were not.

WORLD EGG SITUATION

LITTLE GAINS EXPECTED IN U.S. EGG EXPORTS IN 1993

In 1992, U.S. table egg exports continued to be fueled by the Export Enhancement Program (EEP). U.S. total egg exports were around 157 million dozen in 1992, about 2 percent above the 1991 export level. U.S. exports to Hong Kong, which benefit from EEP export bonuses, comprised about 55 percent of U.S. table egg exports in 1992. Sales of table eggs were also up to Mexico but down to Canada. Total egg exports to Mexico increased about 70 percent with the aid of GSM-102 export credit guarantees. Egg exports to the United Arab Emirates, another market targeted by the EEP, about tripled in 1992. Hatching egg exports are up about 7 percent, led by Canada which accounts for 40 percent of the trade.

Final data are expected to show that U.S. egg exports in 1993 were slightly below 1992, about 159 million dozen shell-egg equivalent valued at $140 million. Higher domestic egg prices in 1993 dampened exports of egg products. For the first 10 months of 1993, total egg exports were just slightly above a year earlier. Exports of

table eggs were up while exports of egg products fell. The major reason for the decline in egg product export was the 70-percent drop in sales to Japan. Still, Japan accounted for nearly 60 percent of U.S. egg product exports for the first 10 months of 1993.

In 1994, lower U.S. egg prices will help increase exports. Japan and Mexico are expected to be the leading market for egg products in 1994. The level of table egg exports in 1994 will continue to be heavily influenced by sales under the EEP.

DOMESTIC JAPANESE EGG PRICES CONTINUE TO FALL

Due to the continued high output of eggs in 1993, Japanese wholesale egg prices were expected to hit the lowest level since the end of World War II. Wholesale prices did pull up during the second quarter as production temporarily leveled off. However, layer output rose again during the third quarter and prices resumed their decline.

Egg imports during 1993 were expected to remain stable to slightly higher as the strong yen encouraged volume buyers to increase their purchases, particularly of dry egg products. January-September egg imports for frozen whole eggs were up 22 percent, frozen yolk up 13 percent, dried albumen up 10 percent, frozen albumen down 19 percent, dried whole eggs up 21 percent, and dried egg yolk down 7 percent. Imports of U.S. frozen egg yolk increased 33 percent during the same period in 1992 and accounted for 74 percent of Japanese frozen egg yolk imports.

The mismatch of demand and supply in the Japanese egg market will likely continue through the end of 1994. The estimated decline of 1-2 percent in domestic egg production is not expected to change this gloomy outlook. Lower chick placements for layers point to further production declines in 1995.

INCREASED EGG CONSUMPTION TIGHTENS CANADIAN EGG SUPPLY

An unexpected jump in the demand for table eggs in Canada throughout 1993 resulted in difficulty for the Canadian Egg Marketing Agency to meet demand from Canadian egg processors. As a result, Canada's Department of External Affairs issued supplementary import permits for shell eggs (for processing) for the first time in five years.

Canadian shell egg production in 1993 is expected to have registered an increase of about 1 percent over the year earlier level. Beginning in early 1993, consumption of table eggs showed an increase for the first time in several years. In response, the Canadian Egg Marketing Agency (CEMA), increased the domestic production allocation to meet the sudden jump in the demand for table eggs.

However, in an effort to meet this table market commitment, CEMA was unable to adequately supply the industrial market demand for breaking eggs. As a result, the GOC began issuing supplementary import permits for shell eggs to domestic egg breakers for the first time since 1988 (see table). Presently, CEMA expects the increase in table egg consumption to continue into 1994. Industry observers speculate that the longstanding decline of egg consumption in Canada may be over, partly due to a marked reduction in health/diet reports that portrayed eggs as a cholesterol "villain", and to CEMA's aggressive promotional campaign to increase egg consumption.

The GOC granted import protection to the Canadian Broiler Hatching Egg Marketing Agency in 1989. Since that time, the GOC's administrative policy on import quota allocation procedures has severely affected the market access of the U.S. industry. The utilization rates of the import quotas for broiler hatching eggs and chicks for the first 10 months of 1993 were well below the annualized rate required to ensure 100-percent quota utilization.

MEXICAN EGG PRODUCTION FORECAST REMAINS UNCHANGED

The 1994 egg production forecast remains at 20,450 million dozen. The domestic egg industry continues to be dominated by a small number of large, vertically integrated companies, particularly those involved with breeding stock and feed mills. In 1994, table egg consumption is expected to continue to show only moderate growth because of health concerns.

Table egg imports for 1993 are revised up from the last report to 180,000 dozen. Forecast imports of U.S. eggs for 1994 have also been increased to 200,000 dozen due to access rights negotiated in the NAFTA. Table egg imports are currently concentrated in border areas which are generally far from Mexican producing centers. Prior to the NAFTA, table egg imports to other regions of Mexico were limited due to the import permit requirement and high freight costs. This should gradually change with the implementation of NAFTA.

The Tariff-Rate Quota under NAFTA is 6,500 tons (130 million pieces) of eggs (both shell and hatching) for 1994. This will grow at a 3-percent annual compounded rate over a 10-year transition period. U.S. exports to Mexico in excess of the 6,500 tons may be assessed a tariff, initially 50 percent ad valorem.

DUTCH SHELL EGG EXPORTS GAIN IN VOLUME BUT FELL IN VALUE FOR 1993

Dutch egg production in 1993 is estimated about 4.4 percent lower than in 1992, while projections for 1994 are stable to slightly higher than 1993. Producer prices of eggs fluctuated widely during the first 10 months of 1993, but averaged less than 1 percent below 1992. However, prices of layer feed during January-October 1993 averaged about 5.3 percent lower than in the same period of 1992, suggesting an improvement in producer income.

Dutch exports of fresh eggs to non-EU countries in the first 10 months of 1993 increased 2.8 percent in volume despite a 2.1 percent drop in value, as compared with the same period of 1992. In order of importance, exports to third countries increased mainly to Hong Kong (21 percent), Oman (38 percent), Congo (112 percent), and Kuwait (11 percent). As with Dutch poultry exports for 1993, competing EU egg producing countries drove egg prices down and forced many Dutch meat exporters to seek other non-EU markets.

Dutch exports of egg products to non-EU countries in the first 10 months of 1993 increased 9.3 percent in volume and 27.2 percent in value, mainly occurring in exports to Japan (42 percent), to Saudi Arabia (28 percent), and the Czech Republic. For 1994, a slight 2-percent increase in total egg exports to third countries is projected with little increase in egg exports to EU member countries.

AGRICULTURAL PROVISIONS OF THE URUGUAY ROUND AGREEMENT

OVERVIEW

- On December 15, 1993, the United States concluded the seven-year Uruguay Round negotiations within the General Agreement on Tariffs and Trade (GATT). This historic agreement will result in significant improvements for U.S. agricultural trade.

- While the American agricultural industry has naturally focused on immediate improvements in market access as a result of the Uruguay Round, it is important to recognize the longer term benefits of this Agreement:

    - For the first time, agriculture will be fully under the disciplines of the GATT. This will provide a significantly improved process for dealing with agricultural trade problems;

    - Non-tariff trade barriers will be immediately replaced with tariffs, which will simplify future negotiations to liberalize agricultural markets;

    - Binding all of the world's agricultural tariff rates will prohibit countries from exceeding their bound tariff rates without providing compensation;

    - Trade distorting internal support and export subsidies will be capped; countries will not be able to increase such subsidies beyond the levels specified in the Agreement;

    - Accession to the GATT of countries such as China, Russia and Taiwan will be subject to the stronger disciplines developed in the Uruguay Round;

    - For the first time the GATT will have rules developed specifically to allow challenge of unjustified use of health-related barriers to imports.

MARKET ACCESS

- Reduction of import barriers is an important accomplishment of the Uruguay Round. All countries will replace non-tariff measures with ordinary tariffs (tariffication). In addition, when non-tariff measures are removed, countries will open up minimum access opportunities where there has been little or no trade.

- All tariffs, including tariffs established under tariffication, will be subject to a minimum reduction (15% for developed countries, 10% for developing countries) and average reductions (36% for developed countries, 24% for developing countries).

EXPORT SUBSIDIES

- As a result of the Uruguay Round, cuts in export subsidies, most significantly by the EC, will reduce the level of unfair competition in world markets. Export subsidies will be reduced by 21 percent in in terms of quantity and by 36 percent in terms of budgetary outlays by the end of the 6-year implementation period.

- Because only a small portion of U.S. agricultural exports is subsidized, this multilateral cut in subsidization of exports will greatly benefit the United States. By reducing the quantity of exports that can be subsidized on world markets, the Agreement will create trade opportunities for U.S. producers who are more efficient than producers elsewhere.

- In addition, the Uruguay Round establishes a strong framework for further reduction of export subsidies in future negotiations.

SANITARY & PHYTOSANITARY MEASURES

- Another very important achievement of the Uruguay Round is the inclusion of a Sanitary and Phytosanitary (SPS) discipline within the GATT.

- Under the new system, any trade restrictive measures taken by an importing country for the purpose of protecting human, animal or plant health must be based on science, including using risk assessment techniques.

- Stricter standards may be used in a country, but only if the country has a scientific justification for taking the measure. Transparency in the development and implementation of SPS measures will now be required.

URUGUAY ROUND: POULTRY AND EGGS

KEY DEVELOPMENTS FOR U.S. EXPORTS:

- *EU CUTS EXPORT SUBSIDIES:* The European Union will reduce the quantity and budgetary outlay for export subsidies from the current level. In the year 2000 the EU's maximum annual allowable quantity of subsidized poultry exports will be 291,000 tons, 179,000 tons below the quantity of subsidized exports in the 1991-1992 period, and the maximum budgetary expenditure will be 91.6 million ECU. For eggs, the maximum annual allowable quantity of subsidized exports in the year 2000 will be 83,300 tons, 28,700 tons below the level in the 1991-92 period, and the maximum budgetary expenditure will be 25.5 million ECU.

- *EU CUTS TARIFF ON PROCESSED TURKEY:* The EU will reduce its tariff for processed turkey from 17% to 8.5%.

- *EU INCREASES ACCESS FOR POULTRY:* The EU will establish a tariff-rate quota for 18,000 tons in the year 1995, increasing to 29,000 tons in the year 2000.

- *KOREA IMPROVES MARKET ACCESS FOR FROZEN CHICKEN:* Korea will establish a quota for 7,700 tons of frozen chicken in 1995, 10,400 tons in 1996, and 6,500 tons for the first half of 1997. On July 1, 1997, Korea will remove all barriers to frozen chicken imports except for a tariff of 30.5%, which will be reduced to 20% by the year 2004. The 20% tariff on fresh and chilled chicken cuts (liberalized on January 1, 1994) and fresh and chilled whole chickens will be reduced to 18%.

- *PHILIPPINES IMPROVES ACCESS FOR POULTRY:* The Philippines will open a tariff-rate quota for chicken of 14,000 tons, increasing to 23,500 tons by the year 2004; the in-quota tariff will be 50%. The Philippines will also cut the tariff on frozen turkey from 50% to 35%.

- *AUSTRIA INCREASES ACCESS FOR POULTRY:* Austria will establish a tariff-rate quota for a minimum purchase commitment for 1,000 tons of chicken parts.

- *COSTA RICA IMPROVES ACCESS FOR POULTRY:* Costa Rica will provide greater minimum access for poultry, growing from 3 percent of domestic consumption to 5 percent of domestic consumption over the implementation period.

- *HONG KONG BINDS TARIFFS AT ZERO:* Hong Kong will bind all tariffs for poultry and egg products at zero.

- *JAPAN REDUCES TARIFFS FOR EGG YOLKS:* Japan will reduce the duty on dried egg yolks from 25% to 18.8%. The tariff for frozen egg yolks will be reduced from 25% to 20%.

- *FINLAND ALLOWS ACCESS FOR EGGS:* Finland will establish a tariff-rate quota for eggs and egg products of 1,719 tons in 1995, increasing to 2,865 tons by the year 2000.

- *NORWAY INCREASES ACCESS FOR EGGS:* Norway will establish a tariff-rate quota for eggs and egg products of approximately 1,200 tons in 1995, increasing to about 2,000 tons in the year 2000.

U.S. COMMITMENTS:

- *MARKET ACCESS:* The United States will reduce its tariffs for poultry by 20% and its tariffs for eggs by 20% in equal annual installments over 6 years beginning in 1995.

- *EXPORT SUBSIDIES:* The United States will establish a ceiling for the quantity of subsidized exports and budgetary outlays for export subsidies of poultry and eggs. The reductions for eggs will begin from the 1991-92 average levels. The annual allowable quantities and expenditures will be the following:

POULTRY	1995	1996	1997	1998	1999	2000
Quantity (mt)	34,196	32,955	31,715	30,475	29,235	27,994
Budget ($1,000)	21,377	20,013	18,648	17,284	15,919	14,555

EGGS	1998	1996	1997	1998	1999	2000
Quantity (1,000 dozen)	30,262	25,593	20,925	16,256	11,588	6,920
Budget ($1,000)	7,588	6,391	5,195	3,998	2,801	1,604

Note: U.S. poultry exports totaled $928 million in 1992 accounting for 6% of total U.S. poultry production. U.S. eggs exports were valued at over $100 million in 1992.

TOTAL POULTRY MEAT PRODUCTION

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	659	701	708	707	730	752
MEXICO	635	700	840	990	1,090	1,140
UNITED STATES	9,931	10,645	11,204	11,885	12,417	12,984
SUBTOTAL	11,225	12,046	12,752	13,582	14,237	14,876
CENTRAL/SOUTH AMERICA						
GUATEMALA	54	57	61	73	83	90
ARGENTINA	315	335	430	590	605	620
BRAZIL	2,139	2,416	2,691	2,932	3,195	3,485
VENEZUELA	253	225	313	333	350	361
SUBTOTAL	2,761	3,033	3,495	3,928	4,233	4,556
EUROPEAN UNION						
BELGIUM-LUXEM.	179	181	181	189	188	187
DENMARK	128	131	137	158	163	170
FRANCE	1,550	1,651	1,759	1,866	1,860	1,845
GERMANY	603	599	574	604	630	650
GREECE	154	160	160	175	168	162
IRELAND	78	81	83	84	86	87
ITALY	1,025	1,069	1,051	1,057	1,065	1,065
NETHERLANDS	491	526	547	577	565	585
PORTUGAL	207	213	234	237	242	243
SPAIN	831	836	875	867	874	874
UNITED KINGDOM	1,300	1,310	1,360	1,511	1,554	1,595
SUBTOTAL	6,546	6,757	6,961	7,325	7,395	7,463
OTHER WESTERN EUROPE						
AUSTRIA	75	78	83	88	91	93
FINLAND	31	33	37	36	34	36
SUBTOTAL	106	111	120	124	125	129
EASTERN EUROPE						
BULGARIA	188	182	100	95	90	85
HUNGARY	420	426	320	320	320	330
POLAND	348	328	320	336	310	340
ROMANIA	365	425	280	190	160	150
SUBTOTAL	1,321	1,361	1,020	941	880	905
RUSSIA	1,831	1,801	1,751	1,577	1,420	1,350
UKRAINE	731	708	671	600	550	525
SUBTOTAL	2,562	2,509	2,422	2,177	1,970	1,875
MIDDLE EAST						
ISRAEL	171	173	188	206	216	222
SAUDI ARABIA	240	265	285	303	318	337
TURKEY	254	269	284	330	335	340
UNITED ARAB EMIRATES	14	14	14	15	15	17
SUBTOTAL	679	721	771	854	884	916
AFRICA						
EGYPT	254	235	225	225	275	275
SOUTH AFRICA, REP OF	637	697	731	752	735	740
SUBTOTAL	891	932	956	977	1,010	1,015
ASIA						
CHINA (PRC)	2,820	3,229	3,952	4,540	5,100	5,600
HONG KONG	34	32	29	21	19	18
JAPAN	1,423	1,391	1,357	1,367	1,365	1,335
KOREA, REPUBLIC OF	243	269	324	354	368	380
PHILLIPPINES	263	279	287	310	329	335
SINGAPORE	58	56	58	57	60	62
TAIWAN	462	476	480	531	545	555
THAILAND	553	595	655	710	685	710
SUBTOTAL	5,856	6,327	7,142	7,890	8,471	8,995
OCEANIA						
AUSTRALIA	406	419	425	455	470	485
SUBTOTAL	406	419	425	455	470	485
TOTAL	32,353	34,216	36,064	38,253	39,675	41,215

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

TOTAL POULTRY MEAT CONSUMPTION

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	698	738	751	764	791	806
MEXICO	684	741	925	1,101	1,221	1,280
UNITED STATES	9,523	10,048	10,565	11,079	11,431	11,952
SUBTOTAL	10,905	11,527	12,241	12,944	13,443	14,040
CENTRAL/SOUTH AMERICA						
GUATEMALA	54	57	60	84	89	95
ARGENTINA	324	331	437	630	635	680
BRAZIL	1,891	2,111	2,364	2,542	2,807	3,075
VENEZUELA	253	203	290	311	316	339
SUBTOTAL	2,522	2,702	3,151	3,567	3,847	4,189
EUROPEAN UNION						
BELGIUM-LUXEM.	161	158	159	166	166	166
DENMARK	63	60	68	78	59	63
FRANCE	1,147	1,221	1,264	1,268	1,271	1,267
GERMANY	885	885	905	1,044	1,070	1,085
GREECE	162	168	171	185	179	179
IRELAND	81	85	86	86	89	92
ITALY	1,050	1,083	1,069	1,078	1,083	1,084
NETHERLANDS	207	256	295	285	294	305
PORTUGAL	208	214	237	231	239	240
SPAIN	895	905	941	941	945	950
UNITED KINGDOM	1,320	1,375	1,409	1,582	1,602	1,629
SUBTOTAL	6,179	6,410	6,604	6,944	6,997	7,060
OTHER WESTERN EUROPE						
AUSTRIA	92	93	98	103	106	109
FINLAND	31	33	36	37	36	36
SUBTOTAL	123	126	134	140	142	145
EASTERN EUROPE						
BULGARIA	168	170	175	175	175	175
HUNGARY	243	235	240	240	225	230
POLAND	335	311	318	348	333	359
ROMANIA	254	463	318	318	240	218
SUBTOTAL	1,000	1,179	1,051	1,081	973	982
RUSSIA	2,194	2,194	2,042	1,730	1,657	1,619
UKRAINE	635	629	573	531	515	485
SUBTOTAL	2,829	2,823	2,615	2,261	2,172	2,104
MIDDLE EAST						
ISRAEL	144	159	175	195	202	208
SAUDI ARABIA	424	445	516	546	564	587
TURKEY	252	268	283	325	335	340
UNITED ARAB EM.	40	41	54	56	58	60
SUBTOTAL	860	913	1,028	1,122	1,159	1,195
AFRICA						
EGYPT	279	237	227	227	280	290
SOUTH AFRICA, REP O F	546	568	565	763	740	750
SUBTOTAL	825	805	792	990	1,020	1,040
ASIA						
CHINA (PRC)	2,795	3,187	3,915	4,460	5,010	5,505
HONG KONG	183	195	214	263	276	278
JAPAN	1,697	1,689	1,688	1,752	1,708	1,699
KOREA, REPUBLIC OF	243	274	292	373	393	410
PHILLIPPINES	255	283	292	307	331	350
SINGAPORE	96	94	101	101	104	107
TAIWAN	459	471	475	526	540	549
THAILAND	442	451	486	530	535	560
SUBTOTAL	6,170	6,644	7,463	8,312	8,897	9,458
OCEANIA						
AUSTRALIA	406	417	423	451	463	477
SUBTOTAL	406	417	423	451	463	477
TOTAL	31,819	33,546	35,502	37,812	39,113	40,690

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

TOTAL POULTRY MEAT EXPORTS

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	7	6	12	8	7	7
UNITED STATES	398	554	631	772	995	1023
SUBTOTAL	**405**	**560**	**643**	**780**	**1002**	**1030**
SOUTH AMERICA						
ARGENTINA	0	4	1	0	6	0
BRAZIL	248	305	327	390	388	410
VENEZUELA	0	22	22	15	15	20
SUBTOTAL	**248**	**331**	**350**	**405**	**409**	**430**
EUROPEAN UNION						
BELGIUM-LUXEM.	65	77	89	88	93	94
DENMARK	71	79	77	92	118	123
FRANCE	474	497	559	659	665	648
GERMANY	52	64	59	60	60	65
GREECE	3	4	2	4	3	3
IRELAND	5	4	5	5	5	4
ITALY	20	30	31	30	33	33
NETHERLANDS	365	383	395	462	483	490
PORTUGAL	3	5	7	11	12	12
SPAIN	6	4	7	7	7	6
UNITED KINGDOM	64	91	101	120	124	128
SUBTOTAL	**1128**	**1238**	**1332**	**1538**	**1603**	**1606**
INTRA EU TRADE	**695**	**799**	**790**	**997**	**998**	**990**
EASTERN EUROPE						
BULGARIA	30	30	0	0	0	0
HUNGARY	174	189	145	100	95	100
POLAND	18	21	16	13	12	11
ROMANIA	120	0	0	0	0	0
SUBTOTAL	**342**	**240**	**161**	**113**	**107**	**111**
MIDDLE EAST						
ISRAEL	18	19	18	12	14	16
SAUDI ARABIA	2	1	2	4	5	8
TURKEY	2	1	1	1	1	1
SUBTOTAL	**22**	**21**	**21**	**17**	**20**	**25**
AFRICA						
SO. AFRICA, REP OF	11	1	1	3	5	0
ASIA						
CHINA (PRC)	94	110	123	158	195	220
HONG KONG	49	75	95	109	161	171
SINGAPORE	10	11	12	10	8	9
TAIWAN	4	5	5	5	5	6
THAILAND	111	144	169	180	150	150
SUBTOTAL	**268**	**345**	**458**	**462**	**519**	**556**
OCEANIA						
AUSTRALIA	1	2	2	4	7	8
SUBTOTAL	1	2	2	4	7	8
TOTAL	**2,425**	**2,738**	**2,968**	**3,322**	**3,672**	**3,766**
TOTAL (EXCL INTRA-EU TRADE)	**1,730**	**1,939**	**2,178**	**2,325**	**2,674**	**2,776**

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

TOTAL POULTRY MEAT IMPORTS

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	42	53	56	62	61	65
MEXICO	51	46	90	119	145	112
SUBTOTAL	93	99	146	181	206	177
SOUTH AMERICA						
ARGENTINA	1	0	2	42	42	60
SUBTOTAL	1	0	2	42	42	60
EUROPEAN UNION						
BELGIUM-LUXEM.	47	54	67	65	71	73
DENMARK	6	8	8	12	14	16
FRANCE	71	67	64	85	76	70
GERMANY	334	350	356	500	500	500
GREECE	11	12	13	14	14	14
IRELAND	8	8	8	7	8	9
ITALY	45	44	49	51	51	52
NETHERLANDS	81	113	143	170	212	210
PORTUGAL	4	6	6	5	9	9
SPAIN	70	73	73	81	78	82
UNITED KINGDOM	84	156	150	191	172	162
SUBTOTAL	761	891	937	1181	1205	1197
INTRA-EU TRADE	695	799	790	997	998	990
OTHER WESTERN EUROPE						
AUSTRIA	17	15	15	15	15	16
SUBTOTAL	17	15	15	15	15	16
RUSSIA	192	214	115	29	105	105
SUBTOTAL	192	214	115	29	105	105
EASTERN EUROPE						
POLAND	5	1	14	40	25	25
ROMANIA	7	48	32	32	48	55
SUBTOTAL	12	49	46	72	73	80
MIDDLE EAST						
SAUDI ARABIA	194	209	245	250	253	253
UNITED ARAB EMIR.	54	54	61	65	64	65
SUBTOTAL	248	263	306	315	317	318
AFRICA						
EGYPT	25	2	2	2	5	15
SO. AFRICA, REP OF	5	6	8	14	10	10
SUBTOTAL	30	8	10	16	15	25
ASIA						
CHINA (PRC)	49	68	86	110	175	185
HONG KONG	198	239	280	352	420	431
JAPAN	281	301	358	406	380	365
SINGAPORE	48	52	52	57	55	53
KOREA, REPUBLIC OF	10	15	15	19	25	30
SUBTOTAL	586	675	791	944	1055	1064
TOTAL	1,940	2,214	2,368	2,795	3,033	3,042
TOTAL (EXCL INTRA-EU TRADE)	1,245	1,415	1,578	1,798	2,035	2,052

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

BROILER MEAT PRODUCTION

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	539	572	577	574	605	620
MEXICO	590	660	790	940	1,030	1,080
UNITED STATES	7,814	8,360	8,886	9,482	10,003	10,522
SUBTOTAL	8,943	9,592	10,253	10,996	11,638	12,222
SOUTH AMERICA						
ARGENTINA	300	305	415	570	590	600
BRAZIL	2,084	2,356	2,628	2,872	3,130	3,410
VENEZUELA	252	224	313	333	350	361
SUBTOTAL	2,636	2,885	3,356	3,775	4,070	4,371
EUROPEAN UNION						
BELGIUM-LUXEM.	144	147	156	165	164	163
DENMARK	110	116	121	137	144	150
FRANCE	898	959	995	1,020	1,039	1,030
GERMANY	355	334	316	344	350	350
GREECE	136	129	130	144	140	140
IRELAND	40	40	42	43	43	43
ITALY	608	632	615	628	630	630
NETHERLANDS	406	433	454	478	467	485
PORTUGAL	178	182	200	206	210	211
SPAIN	772	766	810	798	810	806
UNITED KINGDOM	770	798	935	941	970	996
SUBTOTAL	4,417	4,536	4,774	4,904	4,967	5,004
OTHER WESTERN EUROPE						
AUSTRIA	59	60	62	64	66	67
FINLAND	27	28	32	31	29	31
SUBTOTAL	86	88	94	95	95	98
EASTERN EUROPE						
HUNGARY	330	290	215	200	210	215
POLAND	210	180	170	168	156	172
ROMANIA	290	400	260	175	145	130
SUBTOTAL	830	870	645	543	511	517
RUSSIA	991	984	978	867	800	780
UKRAINE	396	388	374	288	260	250
SUBTOTAL	1,387	1,372	1,352	1,155	1,060	1,030
MIDDLE EAST						
ISRAEL	115	121	128	138	142	146
SAUDI ARABIA	240	263	275	292	308	326
TURKEY	180	260	275	320	325	330
SUBTOTAL	535	644	678	750	775	802
AFRICA						
EGYPT	195	185	170	170	220	225
SOUTH AFRICA, REP OF	525	585	620	640	625	630
SUBTOTAL	720	770	790	810	845	855
ASIA						
CHINA (PRC)	1,210	1,400	1,745	2,025	2,300	2,550
HONG KONG	23	22	20	17	15	15
JAPAN	1,300	1,272	1,243	1,252	1,250	1,220
THAILAND	538	575	630	680	650	670
SINGAPORE	48	45	48	46	49	51
TAIWAN	351	362	375	413	425	435
SUBTOTAL	3,470	3,676	4,061	4,433	4,689	4,941
OCEANIA						
AUSTRALIA	365	377	383	410	423	437
SUBTOTAL	365	377	383	410	423	437
TOTAL	23,389	24,810	26,386	27,871	29,073	30,277

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

BROILER MEAT CONSUMPTION

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	579	613	625	635	662	677
MEXICO	633	694	845	1,009	1,107	1,160
UNITED STATES	7,444	7,847	8,310	8,808	9,136	9,614
SUBTOTAL	**8,656**	**9,154**	**9,780**	**10,452**	**10,905**	**11,451**
SOUTH AMERICA						
ARGENTINA	309	301	422	610	638	660
BRAZIL	1,840	2,056	2,306	2,494	2,757	3,020
VENEZUELA	252	202	290	315	326	346
SUBTOTAL	**2,401**	**2,559**	**3,018**	**3,419**	**3,721**	**4,026**
EUROPEAN UNION						
BELGIUM-LUXEM.	134	126	127	120	121	120
DENMARK	51	49	50	59	62	65
FRANCE	599	649	639	659	669	673
GERMANY	532	544	566	556	605	590
GREECE	140	136	136	154	150	151
IRELAND	45	45	47	47	49	50
ITALY	631	650	636	646	647	647
NETHERLANDS	178	197	202	209	210	220
PORTUGAL	180	184	197	202	206	208
SPAIN	823	813	851	850	857	857
UNITED KINGDOM	816	856	990	1,006	1,052	1,066
SUBTOTAL	**4,129**	**4,249**	**4,441**	**4,508**	**4,628**	**4,647**
OTHER WESTERN EUROPE						
AUSTRIA	62	62	63	66	68	69
FINLAND	27	28	31	33	33	34
SUBTOTAL	**89**	**90**	**94**	**99**	**101**	**103**
EASTERN EUROPE						
HUNGARY	218	210	190	147	150	158
POLAND	215	179	182	190	186	198
ROMANIA	211	435	296	296	217	198
SUBTOTAL	**644**	**824**	**668**	**633**	**553**	**554**
RUSSIA	1,289	1,255	1,190	870	848	811
UKRAINE	376	361	339	253	222	210
SUBTOTAL	**1,665**	**1,616**	**1,529**	**1,123**	**1,070**	**1,021**
MIDDLE EAST						
ISRAEL	104	110	116	134	139	143
SAUDI ARABIA	420	442	480	534	554	576
TURKEY	175	259	274	315	325	330
SUBTOTAL	**699**	**811**	**870**	**983**	**1,018**	**1,049**
AFRICA						
EGYPT	215	187	170	170	225	240
SO. AFRICA, REP OF	470	496	508	647	627	637
SUBTOTAL	**685**	**683**	**678**	**817**	**852**	**877**
ASIA						
CHINA (PRC)	1,466	1,749	1,734	1,963	2,235	2,475
HONG KONG	148	157	172	210	227	230
JAPAN	1,564	1,560	1,563	1,752	1,708	1,699
SINGAPORE	85	81	91	89	92	95
TAIWAN	351	362	375	397	413	415
THAILAND	430	436	466	505	510	530
SUBTOTAL	**4,044**	**4,345**	**4,401**	**4,916**	**5,185**	**5,444**
OCEANIA						
AUSTRALIA	365	375	381	406	416	429
SUBTOTAL	**365**	**375**	**381**	**406**	**416**	**429**
TOTAL	**23,377**	**24,706**	**25,860**	**27,356**	**28,449**	**29,601**

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

BROILER MEAT EXPORTS

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	1	1	5	1	2	2
UNITED STATES	369	518	572	675	866	907
SUBTOTAL	370	519	577	676	868	909
SOUTH AMERICA						
ARGENTINA	0	4	1	0	6	0
BRAZIL	244	300	322	378	373	390
VENEZUELA	0	22	22	19	25	24
SUBTOTAL	244	326	345	397	404	414
EUROPEAN UNION						
BELGIUM-LUXEM.	35	48	62	80	80	81
DENMARK	60	70	76	81	86	90
FRANCE	349	358	401	429	435	420
GERMANY	28	35	31	80	50	50
GREECE	2	2	2	2	2	2
IRELAND	3	3	3	3	3	3
ITALY	7	10	10	11	12	12
NETHERLAND	265	286	317	355	372	385
PORTUGAL	1	3	5	7	8	8
SPAIN	5	3	6	4	5	4
UNITED KINGDOM	26	27	35	35	38	40
SUBTOTAL	781	845	948	1,087	1,091	1,095
INTRA-EU TRADE	436	494	526	568	615	603
EASTERN EUROPE						
ROMANIA	85	65	50	0	0	0
HUNGARY	96	95	74	55	55	60
SUBTOTAL	181	160	124	55	55	60
MIDDLE EAST						
ISRAEL	14	11	10	4	4	4
SAUDI ARABIA	2	2	5	4	5	8
TURKEY	2	1	1	1	1	1
SUBTOTAL	18	14	16	9	10	13
AFRICA						
SO. AFRICA, REP OF	11	1	1	3	5	0
SUBTOTAL	11	1	1	3	5	0
ASIA						
CHINA (PRC)	83	86	93	110	125	140
HONG KONG	47	72	94	104	155	162
SINGAPORE	10	11	11	10	8	9
THAILAND	108	139	164	175	140	140
SUBTOTAL	248	308	362	399	428	451
OCEANIA						
AUSTRALIA	1	2	2	4	7	8
SUBTOTAL	1	2	2	4	7	8
TOTAL	1,843	2,174	2,374	2,627	2,863	2,950
TOTAL (EXCL INTRA-EU TRADE)	1,407	1,680	1,848	2,059	2,248	2,347

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICE

DAIRY, LIVESTOCK AND POULTRY DIVISION

BROILER MEAT IMPORTS

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	39	49	51	57	56	60
MEXICO	45	39	60	74	80	60
SUBTOTAL	84	88	111	131	136	120
SOUTH AMERICA						
ARGENTINA	1	0	2	42	60	60
SUBTOTAL	1	0	2	42	60	60
EUROPEAN UNION						
BELGIUM-LUXEM.	25	27	33	35	37	38
DENMARK	1	3	5	3	4	5
FRANCE	50	48	45	68	65	63
GERMANY	205	245	281	292	305	290
GREECE	6	9	8	12	12	13
IRELAND	8	8	8	7	8	9
ITALY	30	28	31	29	29	29
NETHERLANDS	37	50	65	86	115	120
PORTUGAL	3	5	2	3	4	5
SPAIN	56	50	48	56	52	56
UNITED KINGDOM	72	85	90	100	120	110
SUBTOTAL	493	558	616	691	751	738
INTRA EU-TRADE	436	494	526	568	615	603
OTHER WESTERN EUROPE						
AUSTRIA	3	2	2	2	2	2
SUBTOTAL	3	2	2	2	2	2
RUSSIA	183	175	107	27	100	100
SUBTOTAL	183	175	107	27	100	100
EASTERN EUROPE						
ROMANIA	5	5	20	30	46	55
SUBTOTAL	5	5	20	30	46	55
MIDDLE EAST						
SAUDI ARABIA	194	209	204	249	253	252
SUBTOTAL	194	209	204	249	253	252
AFRICA						
EGYPT	20	2	2	2	5	15
SO. AFRICA, REP OF	1	3	2	10	7	7
SUBTOTAL	21	5	4	12	12	22
ASIA						
CHINA (PRC)	49	65	82	105	170	180
HONG KONG	172	208	246	300	368	378
JAPAN	271	291	347	396	370	355
SINGAPORE	47	50	51	56	54	52
SUBTOTAL	539	614	726	857	962	965
TOTAL	1,523	1,656	1,792	2,041	2,322	2,314
TOTAL (EXCL INTRA-EU TRADE)	1,087	1,162	1,266	1,473	1,707	1,711

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

TURKEY MEAT PRODUCTION

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	120	129	131	132	125	132
MEXICO	9	8	12	13	10	8
UNITED STATES	1,876	2,048	2,088	2,167	2,180	2,223
SUBTOTAL	**2,005**	**2,185**	**2,231**	**2,312**	**2,315**	**2,363**
SOUTH AMERICA						
BRAZIL	55	60	63	60	65	75
SUBTOTAL	**55**	**60**	**63**	**60**	**65**	**75**
EUROPEAN UNION						
BELGIUM-LUXEM.	6	4	4	4	4	4
DENMARK	3	3	4	5	6	7
FRANCE	387	432	487	558	545	540
GERMANY	118	145	149	159	169	169
GREECE	3	3	3	3	3	3
IRELAND	16	16	16	16	16	16
ITALY	257	279	273	269	275	275
NETHERLANDS	27	30	32	34	34	36
PORTUGAL	29	30	33	30	31	31
SPAIN	21	29	27	22	23	23
UNITED KINGDOM	230	223	242	246	249	255
SUBTOTAL	**1,097**	**1,194**	**1,270**	**1,346**	**1,355**	**1,359**
EASTERN EUROPE						
POLAND	15	15	15	15	16	17
SUBTOTAL	**15**	**15**	**15**	**15**	**16**	**17**
RUSSIA	72	54	45	37	35	33
SUBTOTAL	72	54	45	37	35	33
MIDDLE EAST						
ISRAEL	56	52	60	68	74	76
SUBTOTAL	**56**	**52**	**60**	**68**	**74**	**76**
TOTAL	**3,300**	**3,560**	**3,684**	**3,838**	**3,860**	**3,923**

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

TURKEY MEAT CONSUMPTION

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	119	125	126	129	131	133
MEXICO	14	15	41	58	68	72
UNITED STATES	1,863	1,992	2,060	2,086	2,082	2,128
SUBTOTAL	1,996	2,132	2,227	2,273	2,281	2,333
SOUTH AMERICA						
BRAZIL	51	55	58	48	50	55
SUBTOTAL	51	55	58	48	50	55
EUROPEAN UNION						
BELGIUM-LUXEM.	18	19	22	26	27	28
DENMARK	4	6	7	9	11	12
FRANCE	301	315	342	357	348	353
GERMANY	172	208	240	272	286	290
GREECE	4	4	5	4	6	5
IRELAND	14	14	14	14	14	14
ITALY	256	272	265	268	272	273
NETHERLANDS	19	27	29	33	34	35
PORTUGAL	29	30	35	30	33	35
SPAIN	31	44	40	29	31	31
UNITED KINGDOM	210	211	236	228	232	238
SUBTOTAL	1,058	1,150	1,235	1,270	1,294	1,314
EASTERN EUROPE						
POLAND	15	13	16	18	19	20
SUBTOTAL	15	13	16	18	19	20
RUSSIA	120	92	75	72	60	50
SUBTOTAL	120	92	75	72	60	50
MIDDLE EAST						
ISRAEL	44	44	46	61	63	65
SUBTOTAL	44	44	46	61	63	65
TOTAL	3,284	3,486	3,657	3,742	3,767	3,837

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

TURKEY MEAT EXPORTS

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	6	5	7	7	6	6
UNITED STATES	19	24	47	78	104	88
SUBTOTAL	25	29	54	85	110	94
SOUTH AMERICA						
BRAZIL	4	5	5	12	15	20
SUBTOTAL	4	5	5	12	15	20
EUROPEAN UNION						
BELGIUM-LUXEM.	5	7	7	8	9	11
DENMARK	1	0	1	1	1	1
FRANCE	95	123	150	206	200	190
GERMANY	11	14	14	8	10	12
GREECE	0	0	0	1	0	0
IRELAND	3	3	3	3	3	3
ITALY	12	17	19	17	19	19
NETHERLANDS	25	28	32	32	35	35
SPAIN	0	0	0	0	0	0
UNITED KINGDOM	30	33	29	38	39	41
SUBTOTAL	182	225	255	314	316	312
INTRA-EU TRADE	132	170	192	211	222	229
MIDDLE EAST						
ISRAEL	10	8	8	8	10	12
SUBTOTAL	10	8	8	8	10	12
TOTAL	221	267	322	419	451	438
TOTAL (EXCL INTRA EU-TRADE)	89	97	130	208	229	209

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

TURKEY MEAT IMPORTS

SELECTED COUNTRIES
(1,000 METRIC TONS IN READY-TO-COOK-EQUIVALENTS)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	3	4	5	5	5	5
MEXICO	5	7	29	45	64	50
SUBTOTAL	8	11	34	50	69	55
EUROPEAN UNION						
BELGIUM-LUXEM.	17	22	25	30	32	35
DENMARK	2	3	4	5	6	6
FRANCE	9	6	5	5	3	3
GERMANY	65	77	105	121	127	133
GREECE	1	1	2	2	3	2
IRELAND	1	1	1	1	1	1
ITALY	11	10	11	16	16	17
NETHERLANDS	17	25	29	31	35	34
PORTUGAL	0	0	2	0	1	4
SPAIN	10	15	13	7	8	8
UNITED KINGDOM	10	21	23	20	22	24
SUBTOTAL	143	181	220	238	254	267
INTRA-EU TRADE	132	170	192	211	222	229
RUSSIA	0	2	0	2	2	2
SUBTOTAL	0	2	0	2	2	2
ASIA						
SOUTH KOREA, REP OF	0	6	11	15	18	20
SUBTOTAL	0	6	11	15	17	20
TOTAL	151	200	265	305	342	344
TOTAL (EXCL INTRA EU-TRADE)	19	30	73	94	120	115

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

EGG PRODUCTION

SELECTED COUNTRIES
(MILLION PIECES)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	5,719	5,661	5,666	5,614	5,670	5,710
MEXICO	17,950	18,040	19,840	19,650	20,140	20,450
UNITED STATES	67,178	67,987	69,352	70,592	71,476	72,240
SUBTOTAL	90,847	91,688	94,858	95,856	97,286	98,400
SOUTH AMERICA						
ARGENTINA	3,350	3,900	4,550	3,900	3,400	3,400
BRAZIL	12,174	13,454	13,655	14,190	12,700	13,500
VENEZUELA	2,600	1,146	1,928	2,353	2,252	2,320
SUBTOTAL	18,124	18,500	20,133	20,443	18,352	19,220
EUROPEAN UNION						
BELGIUM-LUXEM.	2,724	2,941	3,134	3,196	3,203	3,208
DENMARK	1,410	1,409	1,435	1,440	1,300	1,300
FRANCE	15,050	14,629	15,300	15,375	15,400	15,400
GERMANY	17,794	16,800	15,525	15,165	14,700	14,800
GREECE	2,507	2,566	2,514	2,495	2,540	2,500
IRELAND	640	640	640	640	640	640
ITALY	11,223	11,454	11,568	11,454	11,470	11,470
NETHERLANDS	10,660	10,801	10,762	10,458	10,000	10,100
PORTUGAL	1,520	1,590	1,671	1,814	1,840	1,860
SPAIN	10,140	10,659	10,184	8,675	8,985	9,000
UNITED KINGDOM	10,547	10,658	11,006	10,699	10,680	10,720
SUBTOTAL	84,215	84,147	83,739	81,411	80,758	80,998
OTHER WESTERN EUROPE						
AUSTRIA	1,695	1,664	1,691	1,690	1,700	1,700
FINLAND	1,288	1,232	1,077	1,087	1,120	1,120
SUBTOTAL	2,983	2,896	2,768	2,777	2,820	2,820
EASTERN EUROPE						
HUNGARY	4,250	4,300	4,100	4,000	3,900	3,800
POLAND	8,200	7,649	6,500	6,300	6,200	6,300
ROMANIA	7,600	7,100	6,900	6,700	5,450	5,600
SUBTOTAL	20,050	19,049	17,500	17,000	15,550	15,700
RUSSIA	49,042	47,470	47,132	42,552	40,000	39,000
UKRAINE	17,393	16,287	15,188	13,445	12,000	11,500
SUBTOTAL	66,435	63,757	62,320	55,997	52,000	50,500
MIDDLE EAST						
ISRAEL	1,898	1,843	1,797	1,901	1,952	2,005
SAUDI ARABIA	2,800	2,900	2,863	2,850	2,915	2,975
TURKEY	7,200	7,500	7,300	7,800	8,100	8,100
SUBTOTAL	11,898	12,243	11,960	12,551	12,967	13,080
AFRICA						
EGYPT	3,000	3,200	3,000	3,000	3,050	3,100
SUBTOTAL	3,000	3,200	3,000	3,000	3,050	3,100
ASIA						
CHINA (PRC)	140,900	158,920	185,000	203,980	215,000	225,000
HONG KONG	34	34	33	21	18	20
JAPAN	40,356	40,318	41,638	42,911	43,120	42,600
KOREA, REPUBLIC OF	6,919	7,145	7,770	7,750	8,200	8,800
TAIWAN	4,450	4,500	4,806	5,146	5,450	5,350
SUBTOTAL	192,659	210,917	239,247	259,808	271,788	281,770
OCEANIA						
AUSTRALIA	3,286	3,468	3,540	3,710	3,784	3,800
SUBTOTAL	3,286	3,468	3,540	3,710	3,784	3,800
TOTAL	493,497	509,865	539,065	552,553	558,355	569,388

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

TABLE EGG CONSUMPTION

SELECTED COUNTRIES
(IN MILLION PIECES)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	4,435	4,300	4,280	4,061	4,115	4,120
MEXICO	16,233	16,281	17,839	17,666	18,144	18,494
UNITED STATES	47,708	46,696	46,139	46,078	45,824	45,720
SUBTOTAL	68,376	67,277	68,258	67,805	68,083	68,334
SOUTH AMERICA						
ARGENTINA	3,050	3,100	3,750	2,817	2,205	2,155
BRAZIL	12,174	13,450	13,635	14,168	12,700	13,480
VENEZUELA	2,325	1,030	1,829	2,218	2,089	2,175
SUBTOTAL	17,549	17,580	19,214	19,203	16,994	17,810
EUROPEAN UNION						
BELGIUM-LUXEM.	2,165	2,337	2,446	2,468	2,465	2,462
DENMARK	1,375	1,364	1,412	1,464	1,298	1,298
FRANCE	15,806	14,989	15,490	15,526	15,420	15,320
GERMANY	21,615	20,620	19,988	19,532	18,680	19,205
GREECE	2,527	2,593	2,535	2,500	2,550	2,511
IRELAND	847	847	847	847	807	807
ITALY	12,306	12,317	12,475	12,409	12,400	12,400
NETHERLANDS	3,302	3,299	3,246	3,387	3,420	3,450
PORTUGAL	1,515	1,580	1,613	1,767	1,804	1,860
SPAIN	10,586	10,977	10,307	8,869	9,178	9,193
UNITED KINGDOM	10,961	11,453	11,730	11,300	11,284	11,328
SUBTOTAL	83,005	82,376	82,089	80,069	79,306	79,834
OTHER WESTERN EUROPE						
AUSTRIA	1,674	1,649	1,645	1,646	1,652	1,650
FINLAND	881	832	800	824	818	818
SUBTOTAL	2,555	2,481	2,445	2,470	2,470	2,468
EASTERN EUROPE						
ROMANIA	7,459	6,956	6,277	6,535	5,910	6,025
POLAND	5,620	5,490	5,520	7,245	6,695	6,800
SUBTOTAL	13,079	12,446	11,797	13,780	12,605	12,825
RUSSIA	49,241	47,670	47,252	42,630	39,070	39,070
UKRAINE	17,393	16,287	15,188	13,445	12,000	11,500
SUBTOTAL	66,634	63,957	62,440	56,075	51,070	50,570
MIDDLE EAST						
ISRAEL	1,520	1,551	1,590	1,853	1,902	1,953
SAUDI ARABIA	2,400	2,470	2,525	2,590	2,590	2,500
TURKEY	5,637	6,570	7,300	7,300	7,540	7,590
SUBTOTAL	9,557	10,591	11,415	11,743	12,032	12,043
AFRICA						
EGYPT	3,000	2,800	2,645	2,700	2,750	2,750
SUBTOTAL	3,000	2,800	2,645	2,700	2,750	2,750
ASIA						
CHINA (PRC)	137,100	154,180	173,377	191,203	201,660	211,260
HONG KONG	1,364	1,401	1,466	1,393	1,498	1,508
JAPAN	30,000	29,100	29,800	34,380	34,590	34,145
KOREA, REPUBLIC OF	6,701	6,810	7,370	7,350	7,780	8,375
TAIWAN	3,834	3,840	3,845	4,452	4,771	4,750
SUBTOTAL	178,999	195,331	215,858	238,778	250,299	260,038
OCEANIA						
AUSTRALIA	2,794	3,017	3,097	3,230	3,290	3,200
SUBTOTAL	2,794	3,017	3,097	3,230	3,290	3,200
TOTAL	445,548	457,856	479,258	495,853	498,899	509,872

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

EGG EXPORTS

SELECTED COUNTRIES
(MILLION PIECES)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	261	274	267	378	408	410
MEXICO	0	0	0	0	0	0
UNITED STATES	1,099	1,206	1,852	1,884	1,903	1,920
SUBTOTAL	1,360	1,480	2,119	2,262	2,311	2,330
SOUTH AMERICA						
BRAZIL	2	4	20	22	10	20
VENEZUELA	0	0	0	6	4	6
SUBTOTAL	2	4	20	28	14	26
EUROPEAN UNION						
BELGIUM-LUXEM.	1,712	1,687	1,714	1,843	1,862	1,870
DENMARK	143	197	178	170	172	172
FRANCE	571	893	1,048	1,170	1,300	1,300
GERMANY	1,537	1,880	1,300	1,100	1,490	1,415
GREECE	0	6	20	30	25	25
IRELAND	3	3	3	3	3	3
ITALY	50	56	29	51	40	40
NETHERLANDS	7,980	8,248	8,373	7,869	7,380	7,550
PORTUGAL	22	22	66	53	43	8
SPAIN	25	53	112	49	53	63
UNITED KINGDOM	410	620	243	245	251	251
SUBTOTAL	12,453	13,665	13,086	12,583	12,619	12,697
INTRA EU-TRADE	10,416	11,483	10,832	9,759	9,850	10,324
OTHER WESTERN EUROPE						
FINLAND	326	329	208	191	230	230
SUBTOTAL	326	329	208	191	230	230
RUSSIA	0	20	20	10	5	1
SUBTOTAL	0	20	20	10	5	1
EASTERN EUROPE						
HUNGARY	125	100	95	95	90	80
POLAND	15	107	10	10	20	10
ROMANIA	535	0	0	0	0	0
SUBTOTAL	675	207	105	105	110	90
MIDDLE EAST						
ISRAEL	145	46	50	49	51	51
SAUDI ARABIA	166	203	173	213	221	228
TURKEY	1,214	47	16	16	7	15
SUBTOTAL	1,525	296	239	278	279	294
AFRICA						
SO. AFRICA, REP OF	34	90	111	92	86	80
SUBTOTAL	34	9	111	92	86	80
ASIA						
CHINA (PRC)	814	786	788	965	900	900
HONG KONG	55	45	35	36	36	43
JAPAN	4	2	2	0	0	0
TAIWAN	26	0	0	9	9	10
SUBTOTAL	933	923	936	1,102	1,031	1,033
OCEANIA						
AUSTRALIA	100	38	38	41	41	44
SUBTOTAL	100	38	38	41	41	44
TOTAL	17,408	16,971	16,882	16,692	16,726	16,825
TOTAL (EXCL INTRA-EU TRADE)	6,992	5,488	6,050	6,933	6,876	6,501

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

EGG IMPORTS

SELECTED COUNTRIES
(MILLION PIECES)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	409	430	404	407	395	410
MEXICO	164	136	135	151	180	200
UNITED STATES	302	109	28	52	60	54
SUBTOTAL	875	566	539	558	575	610
SOUTH AMERICA						
ARGENTINA	5	5	25	30	16	15
VENEZUELA	3	0	46	38	41	41
SUBTOTAL	8	5	71	68	57	56
EUROPEAN UNION						
BELGIUM–LUXEM.	1,153	1,083	1,026	1,115	1,124	1,124
DENMARK	108	152	155	194	170	170
FRANCE	1,327	1,253	1,238	1,321	1,220	1,220
GERMANY	5,358	5,700	5,763	5,467	5,470	5,820
GREECE	20	33	41	35	35	36
IRELAND	210	210	210	210	210	210
ITALY	1,133	919	936	1,006	970	970
NETHERLANDS	622	746	857	798	800	900
PORTUGAL	17	12	8	6	7	8
SPAIN	471	371	235	243	246	256
UNITED KINGDOM	824	1,415	967	846	855	859
SUBTOTAL	11,243	11,894	11,436	11,241	11,107	11,573
INTRA EU–TRADE	10,416	11,483	10,832	9,759	9,850	10,324
OTHER WESTERN EUROPE						
AUSTRIA	350	413	413	296	303	308
SUBTOTAL	350	413	413	296	303	308
RUSSIA	199	200	120	78	70	70
SUBTOTAL	199	200	120	78	70	70
EASTERN EUROPE						
POLAND	0	60	514	965	515	515
SUBTOTAL	0	60	514	965	515	515
MIDDLE EAST						
SAUDI ARABIA	29	29	66	36	31	30
TURKEY	1	5	11	30	30	30
SUBTOTAL	30	34	77	66	61	60
AFRICA						
EGYPT	20	0	0	0	0	0
SUBTOTAL	20	0	0	0	0	0
ASIA						
CHINA (PRC)	23	53	50	88	60	60
HONG KONG	1,605	1,631	1,690	1,633	1,740	1,760
JAPAN	751	769	1,093	771	775	800
SUBTOTAL	2,379	2,453	2,833	2,492	2,575	2,620
TOTAL	15,104	15,625	16,003	15,764	15,263	15,812
TOTAL (EXCL INTRA–EU TRADE)	4,688	4,142	5,171	6,005	5,413	5,488

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

PER CAPITA TOTAL POULTRY MEAT CONSUMPTION

SELECTED COUNTRIES
(IN KILOGRAMS, IN READY-TO-COOK-EQUIVALENTS)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	26.90	27.72	27.82	27.93	28.56	28.84
MEXICO	8.10	8.39	10.24	11.92	12.93	13.26
UNITED STATES	35.02	36.51	37.83	39.19	40.32	41.50
SOUTH AMERICA						
ARGENTINA	13.60	10.29	13.43	19.15	19.07	20.21
BRAZIL	12.90	13.84	15.22	16.07	17.43	18.77
VENEZUELA	13.50	10.31	14.37	15.04	14.91	15.66
EUROPEAN UNION						
BELGIUM-LUXEM.	15.70	15.27	15.32	15.95	15.90	15.87
DENMARK	11.70	11.67	13.20	15.10	11.29	12.03
FRANCE	21.20	21.53	22.17	22.13	22.07	21.91
GERMANY	11.10	11.15	11.32	12.99	13.25	13.38
GREECE	15.70	16.74	17.02	18.38	17.76	17.74
IRELAND	17.80	24.23	24.47	24.42	25.21	26.00
ITALY	18.30	18.78	18.50	18.62	18.67	18.65
NETHERLANDS	15.70	17.13	19.63	18.86	19.35	19.97
PORTUGAL	20.40	20.65	22.76	22.11	22.79	22.81
SPAIN	23.00	23.23	24.11	24.06	24.10	24.17
UNITED KINGDOM	19.30	23.95	24.46	27.37	27.54	27.92
OTHER WESTERN EUROPE						
AUSTRIA	12.10	12.05	12.54	13.09	13.39	13.70
FINLAND	6.30	6.63	7.21	7.39	7.18	7.16
EASTERN EUROPE						
POLAND	8.90	6.17	6.27	6.25	5.84	5.95
RUSSIA	11.96	7.54	6.97	5.86	5.58	5.41
MIDDLE EAST						
ISRAEL	33.70	36.95	38.56	41.07	41.07	41.18
SAUDI ARABIA	27.10	27.35	31.26	32.02	32.02	32.26
TURKEY	4.60	7.79	8.84	9.15	9.26	9.44
AFRICA						
EGYPT	5.40	4.40	4.12	4.03	4.86	4.92
SO. AFRICA, REP OF	14.60	14.37	13.92	18.30	17.29	17.07
ASIA						
CHINA (PRC)	2.60	2.81	3.40	3.81	4.22	4.56
HONG KONG	32.60	33.52	36.56	44.66	46.61	46.69
JAPAN	14.40	13.67	13.61	14.08	13.67	13.55
SINGAPORE	36.30	34.56	36.64	36.17	36.80	37.43
TAIWAN	22.80	13.85	14.13	14.70	15.69	16.43
THAILAND	8.20	8.05	8.55	9.20	9.16	8.88
OCEANIA						
AUSTRALIA	24.60	24.43	24.42	25.66	25.97	26.39

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

PER CAPITA BROILER MEAT CONSUMPTION

SELECTED COUNTRIES
(IN KILOGRAMS, IN READY-TO-COOK-EQUIVALENTS)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	22.30	23.03	23.15	23.22	23.90	24.16
MEXICO	7.50	7.86	9.35	10.92	11.73	12.02
UNITED STATES	26.63	27.67	28.89	30.30	31.34	32.52
SOUTH AMERICA						
ARGENTINA	12.60	9.36	12.97	18.54	19.16	19.61
BRAZIL	12.50	13.48	14.84	15.76	17.12	18.43
VENEZUELA	13.50	10.26	14.37	15.24	15.38	15.98
EUROPEAN UNION						
BELGIUM-LUXEM.	13.10	12.18	12.24	11.53	11.59	11.47
DENMARK	9.40	9.53	9.70	11.43	11.87	12.41
FRANCE	11.10	11.44	11.21	11.50	11.61	11.64
GERMANY	6.70	6.86	7.08	6.92	7.49	7.28
GREECE	13.80	13.55	13.53	15.30	14.88	14.96
IRELAND	12.70	12.83	13.37	13.35	13.88	14.13
ITALY	11.00	11.27	11.00	11.16	11.15	11.13
NETHERLANDS	12.30	13.19	13.44	13.83	13.82	14.41
PORTUGAL	17.60	17.75	18.92	19.33	19.65	19.76
SPAIN	21.10	20.87	21.80	21.73	21.86	21.80
UNITED KINGDOM	14.50	14.91	17.18	17.41	18.08	18.27
OTHER WESTERN EUROPE						
AUSTRIA	8.20	8.03	8.06	8.39	8.59	8.67
FINLAND	5.50	5.63	6.21	6.59	6.58	6.76
EASTERN EUROPE						
HUNGARY	20.60	20.26	18.36	14.23	14.53	15.31
POLAND	5.64	4.70	4.76	4.95	4.83	5.12
RUSSIA	6.67	4.31	4.06	2.95	2.85	2.71
MIDDLE EAST						
ISRAEL	24.30	25.56	25.56	28.22	28.26	28.31
SAUDI ARABIA	26.90	27.16	29.08	31.32	31.45	31.65
TURKEY	3.20	4.53	4.69	5.28	5.34	5.31
AFRICA						
EGYPT	4.10	3.48	3.09	3.02	3.90	4.07
SO. AFRICA, REP OF	12.50	12.54	12.51	15.52	14.65	14.50
ASIA						
CHINA (PRC)	1.49	1.54	1.51	1.68	1.88	2.05
HONG KONG	26.20	26.99	29.38	35.66	38.33	38.63
JAPAN	13.20	126.25	12.60	14.13	13.66	13.55
SINGAPORE	32.10	29.78	33.01	31.88	32.55	33.23
TAIWAN	15.90	17.71	18.15	19.01	19.58	19.48
THAILAND	8.00	7.79	8.20	8.76	8.73	8.41
OCEANIA						
AUSTRALIA	22.20	21.97	21.99	23.10	23.34	23.73

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

PER CAPITA TURKEY MEAT CONSUMPTION

SELECTED COUNTRIES
(IN KILOGRAMS, IN READY-TO-COOK-EQUIVALENTS)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	4.60	4.70	4.67	4.72	4.73	4.75
MEXICO	0.20	0.17	0.45	0.63	0.72	0.75
UNITED STATES	7.53	7.98	8.16	8.16	8.21	8.21
SOUTH AMERICA						
BRAZIL	0.30	0.36	0.37	0.30	0.31	0.34
EUROPEAN UNION						
BELGIUM-LUXEM.	1.80	1.84	2.12	2.50	2.59	2.68
DENMARK	0.80	1.17	1.36	1.74	2.11	2.29
FRANCE	5.40	5.55	6.00	6.23	6.04	6.10
GERMANY	2.20	2.62	3.00	3.38	3.54	3.58
GREECE	0.40	0.40	0.50	0.40	0.60	0.50
IRELAND	4.00	3.99	3.98	3.98	3.97	3.96
ITALY	4.50	4.72	4.58	4.63	4.69	4.70
NETHERLANDS	1.40	1.81	1.93	2.18	2.24	2.29
PORTUGAL	2.80	2.89	3.36	2.87	3.15	3.33
SPAIN	0.80	1.13	1.02	0.74	0.79	0.79
UNITED KINGDOM	3.60	3.67	4.10	3.94	3.99	4.08
EASTERN EUROPE						
POLAND	0.40	0.00	0.00	0.39	0.34	0.41
MIDDLE EAST						
ISRAEL	10.30	9.80	9.50	9.27	8.94	9.11

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

PER CAPITA TABLE EGG CONSUMPTION

SELECTED COUNTRIES
(IN PIECES)

	1989	1990	1991	1992	1993 PRELIM	1994 FORECAST
NORTH AMERICA						
CANADA	171	162	159	148	149	147
MEXICO	193	184	197	191	192	192
UNITED STATES	194	186	183	181	179	177
SOUTH AMERICA						
ARGENTINA	97	96	115	86	66	64
BRAZIL	83	88	88	90	79	82
VENEZUELA	124	52	91	107	99	100
EUROPEAN UNION						
BELGIUM-LUXEM.	195	226	236	237	236	235
DENMARK	220	265	274	284	248	248
FRANCE	262	264	272	271	268	265
GERMANY	253	260	250	243	231	237
GREECE	240	258	252	248	253	249
IRELAND	226	241	241	241	229	228
ITALY	169	214	216	214	214	213
NETHERLANDS	183	221	216	224	225	226
PORTUGAL	129	152	155	169	172	177
SPAIN	248	282	264	227	234	234
UNITED KINGDOM	173	199	204	196	194	194
OTHER WESTERN EUROPE						
AUSTRIA	220	214	211	209	209	207
FINLAND	178	167	160	165	163	163
EASTERN EUROPE						
POLAND	198	144	144	189	174	176
RUSSIA	257	164	161	144	131	131
MIDDLE EAST						
ISRAEL	356	360	350	390	387	387
SAUDI ARABIA	154	152	153	152	147	137
TURKEY	104	115	125	122	124	122
AFRICA						
EGYPT	58	52	48	48	48	47
ASIA						
CHINA (PRC)	126	136	151	163	170	175
HONG KONG	242	241	250	237	253	253
JAPAN	245	235	240	276	277	272
OCEANIA						
AUSTRALIA	170	170	170	170	170	170

SOURCE: COUNSELOR AND ATTACHE REPORTS, OFFICIAL STATISTICS, AND RESULTS OF OFFICE RESEARCH.

COMMODITY AND MARKETING PROGRAMS
FOREIGN AGRICULTURAL SERVICES

DAIRY, LIVESTOCK AND POULTRY DIVISION

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